HR Query Manual v9.1

December 2, 2011

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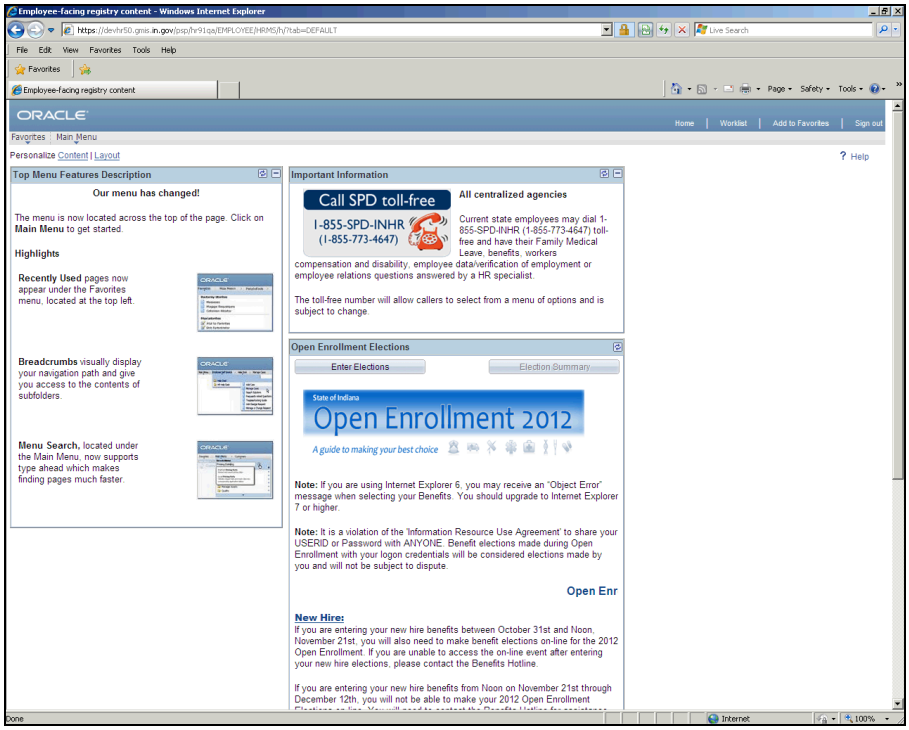
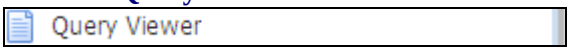
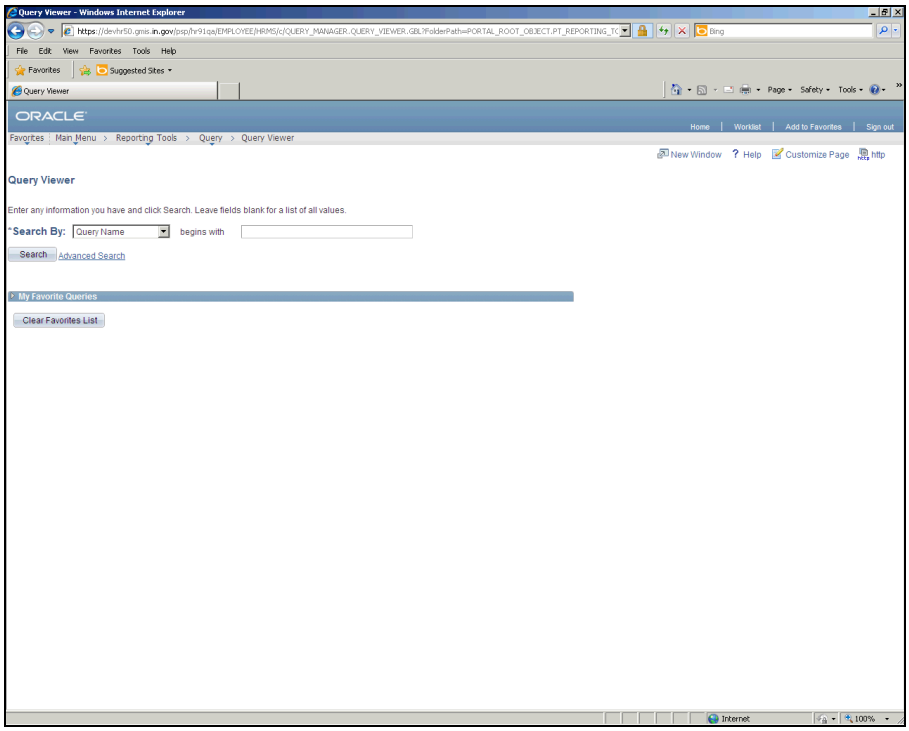
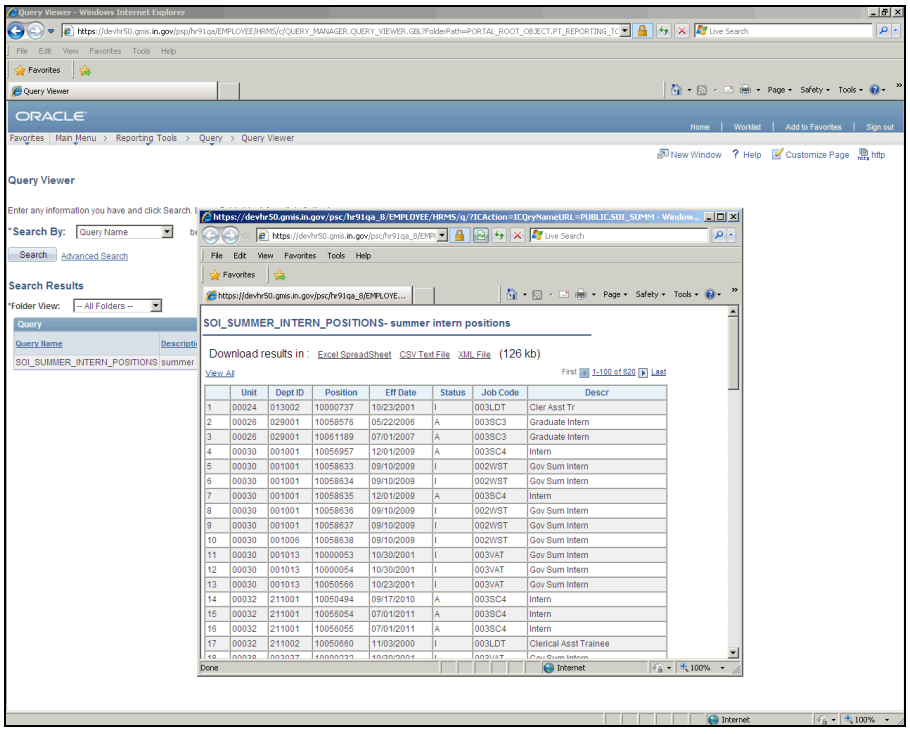


Step	Action
1.	Click the **Main Menu** button. 
2.	Point to the **Reporting Tools** menu.
3.	Point to the **Query** menu.
4.	Click the **Query Viewer** menu. 

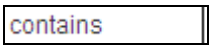


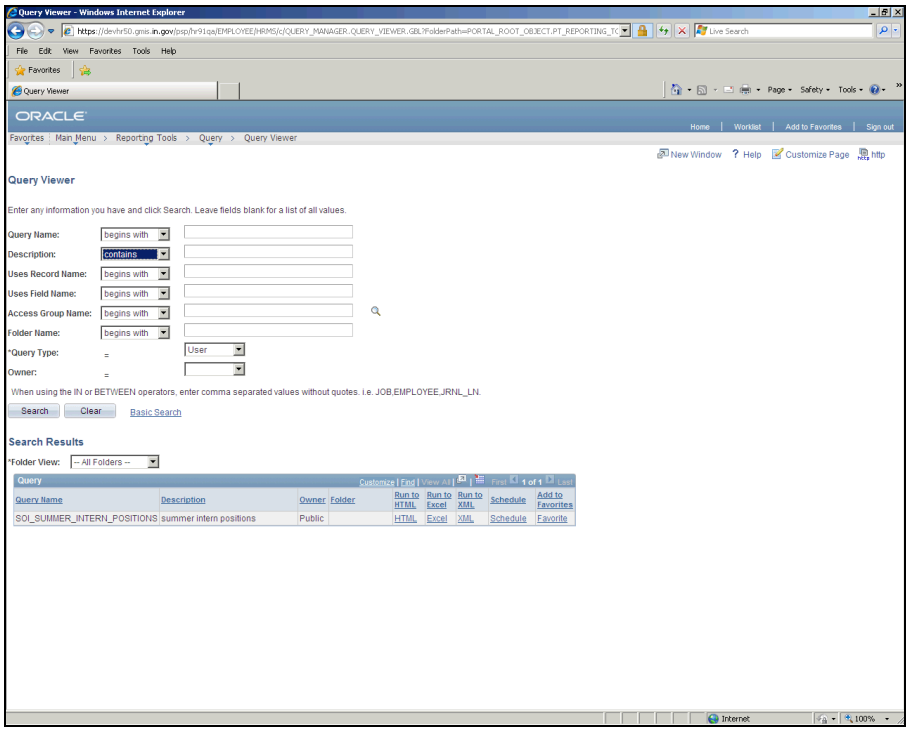
Step	Action
5.	Type the **Name** of a query you want to run or leave the field blank. You may also search by the **Description** of the query. Enter "**soi_sum**".
6.	**Frequently used HR Public Queries** SOI_JOBCODE_IN_AGY List of JCs in an agency SO_E_LEVEL All E-Level EEs sort/salary SOI_FSSA_ACTIVE_EMPS EFFDT Prompt
7.	Click **Search**. Search

Step	Action
8.	**Frequently Used HR Public Queries** Your search will return one or more queries. Notice there are several columns listed: **Query** - The name of the query. **Description** - A short description of the query. **Owner** - To indicate your private queries or public ones that anyone can use. **Folder** - The folder used if you placed this query in a query folder. **Run to HTML** - Click here to run the query to a web page. A new window will open up. **Run to Excel** - Click here to run the query to a spreadsheet. A new window will open up. **Schedule** - Click here to schedule the query to run later or to run a query that returns a lot of information. **Add to Favorites** - Click here to store the query in your query favorites.
9.	We will choose the **Run to HTML** option which opens a new window with the query results in a html format. Click the **Run to HTML** link. HTML

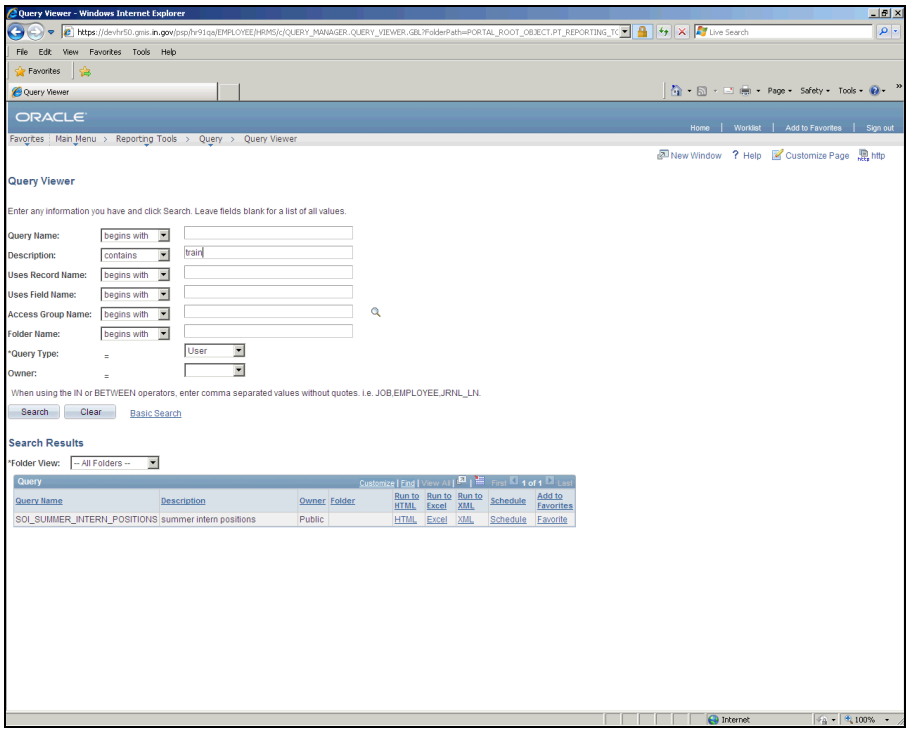


Step	Action
10.	Click the **Maximize** button.

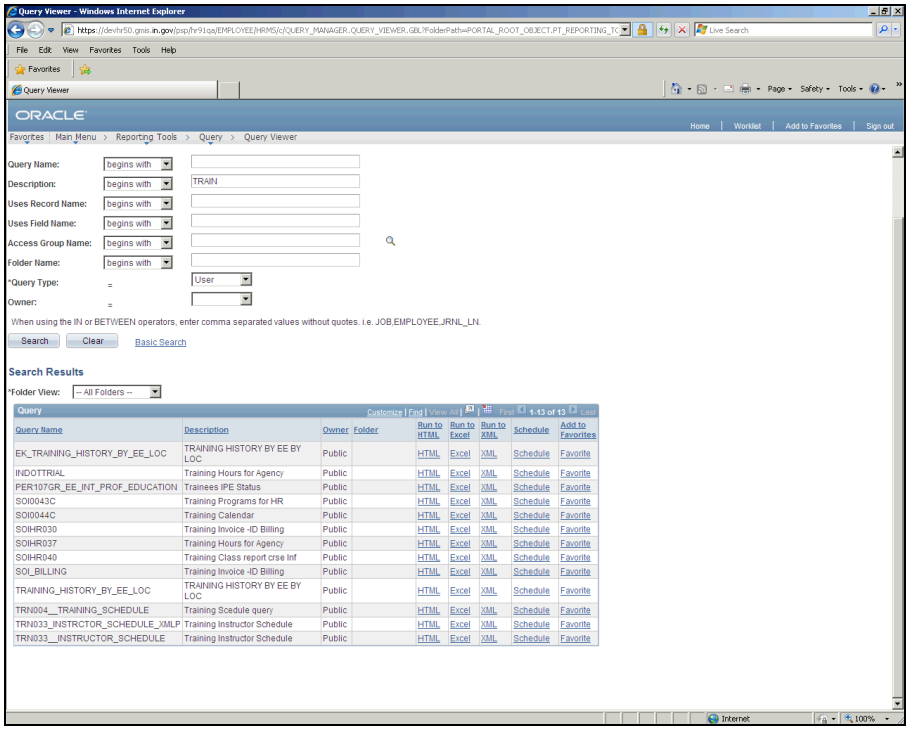
Step	Action
11.	Notice the **Excel Spreadsheet** and **CSV Text File** links. These let you download all rows into Excel or into a comma-delimited text file. You may see the **View All** link above the first column. If the query returned more rows than display on the page, you can click this link to see all rows.
12.	Notice the navigation buttons above the right columns. These let you see the next chunk of rows returned. There are links to the **First** page, < for the previous page, > for the next page, and the **Last** page. You will also see which rows you are looking at and how many rows are returned all together. Click the **Show Next** rows button.
13.	Click the **Close** button. 
14.	Some queries have prompts to limit what is returned. Some ask you to type in values free-form. Others may allow you to click on the **Magnifying Glass** icon to display a list of valid values or the **Calendar** icon to pick a date. Some queries allow a **%** for a wildcard.
15.	We will locate our next query by using the **Advanced Search**. Click the **Advanced Search** link. 
16.	Notice that you have several options here for locating queries.
17.	One option is to search for queries using a particular **Field** or **Record name.** For instance, searching "**Record Name containing TRAINING**" will find queries using the **Training** (history) record. For this example, we will search on the query **Description** field.
18.	Click the **Description** list drop-down menu. 
19.	Click **contains**. 



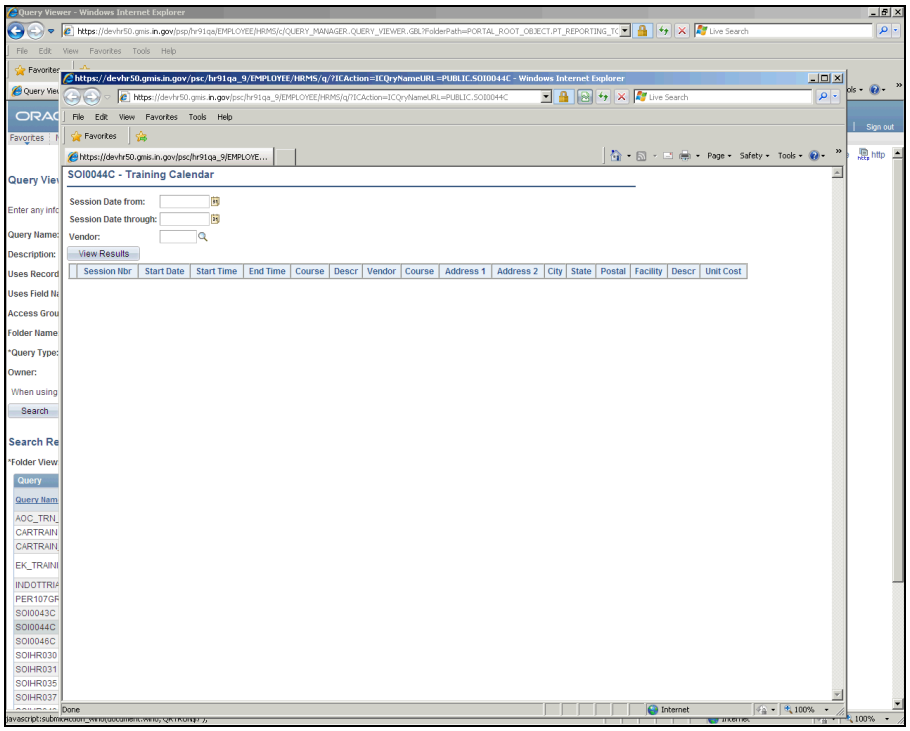
Step	Action
20.	Enter "**train**" into the **Description** field.



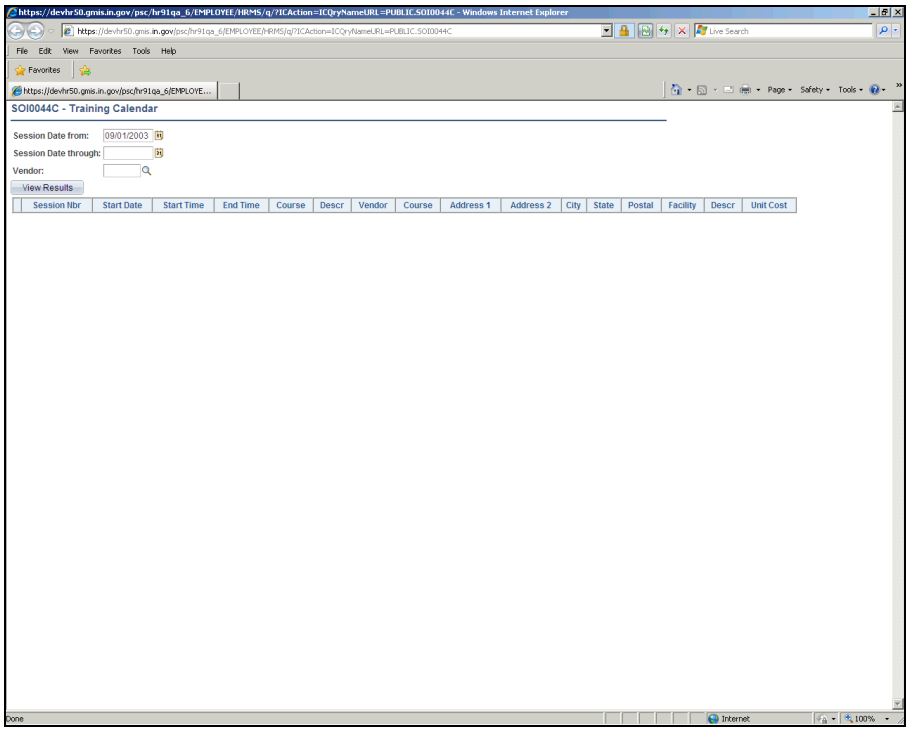
Step	Action
21.	Click **Search.** Search



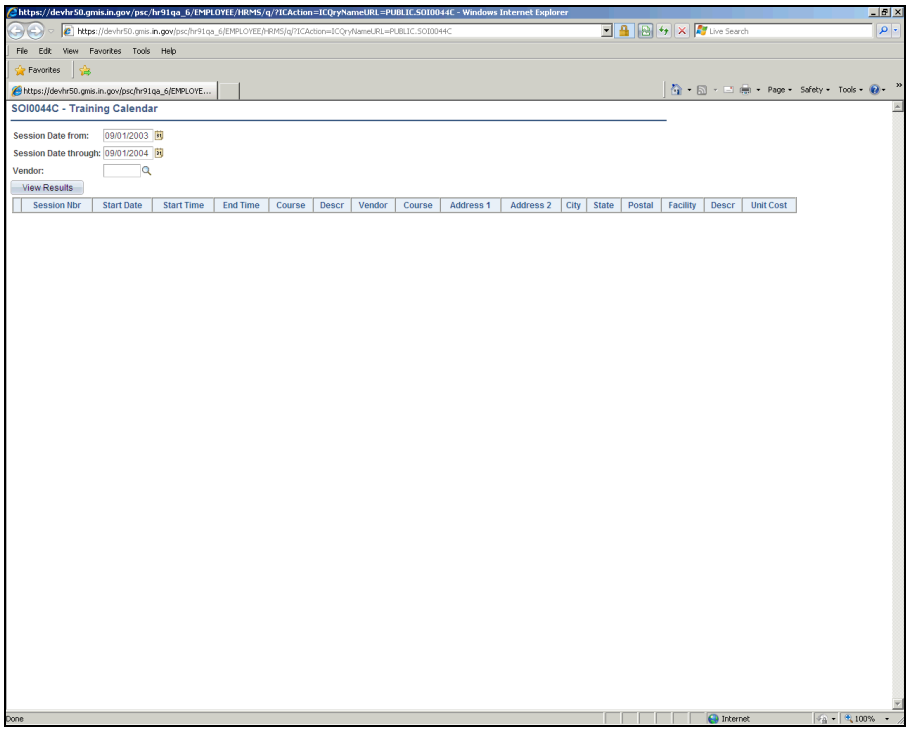
Step	Action
22.	For this example we will look for the **Training Calendar**. Click the **Run to HTML** link. HTML



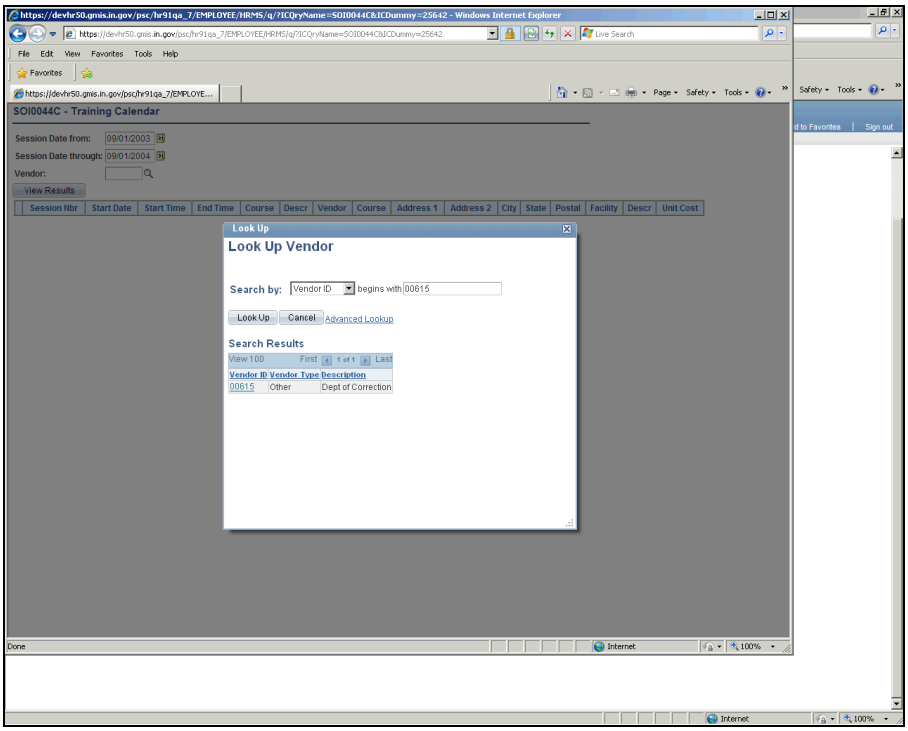
Step	Action
23.	Click the **Maximize** button.
24.	First, we'll choose a **Course Start Date**. Click the **Choose a date (ALT+5)** button. 
25.	Click **September 1, 2003.** 



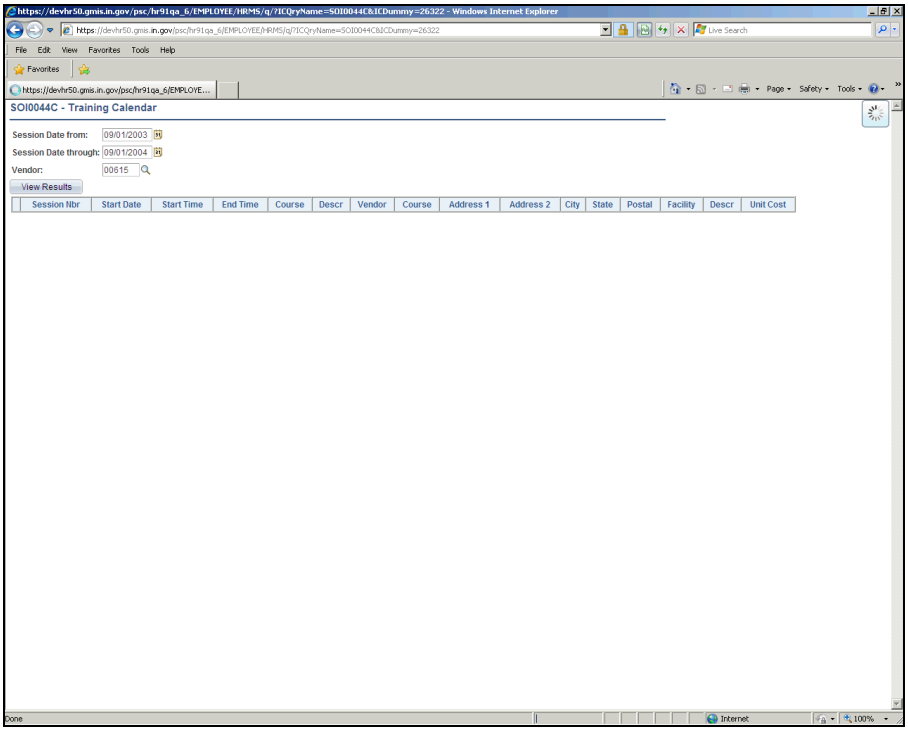
Step	Action
26.	Next, we'll choose a **Through Date.** Click the **Choose a date (Alt+5)** button. 
27.	Click the **September 1, 2004.** 

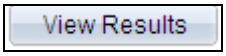


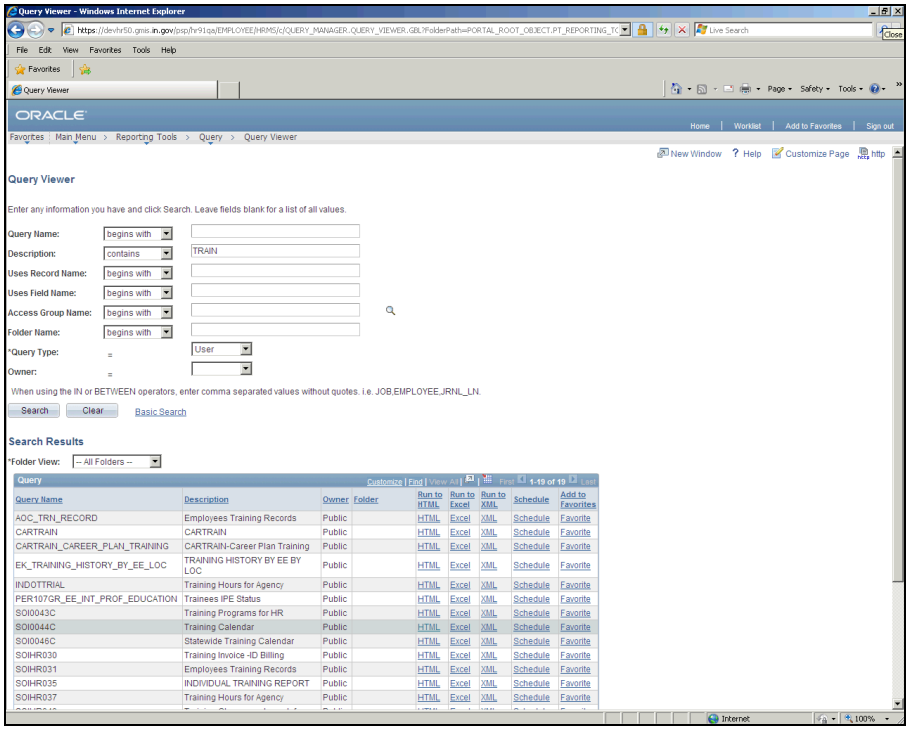
Step	Action
28.	Next we need to choose a **Business Unit** for this query. Here, it's referred to as **Vendor**. Click the **Look up Vender (ALT+5)** button. 
29.	Since the query is asking for a **Vendor,** or **Business Unit,** this window allows you the option of locating the business unit of your choice. If you do not know the **Business Unit**, you can perform an advanced search. For this example we will be using the Department of Correction **Business Unit** which is **"00615"**
30.	Type "**00615**" into the search field.
31.	Click the **Look Up** button. 



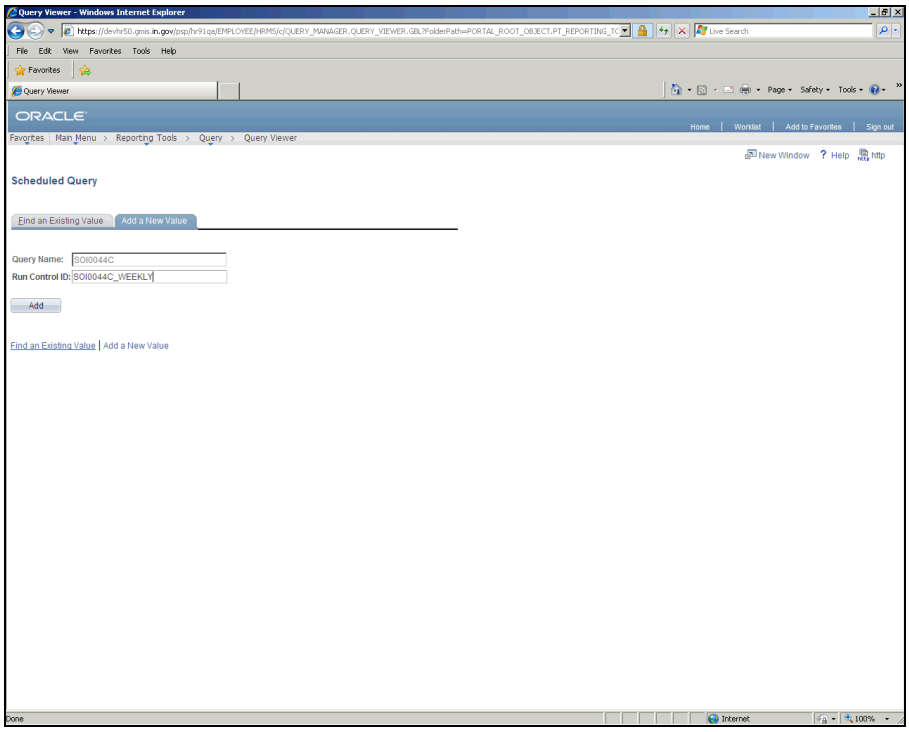
Step	Action
32.	Click the **00615** link. 00615

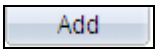


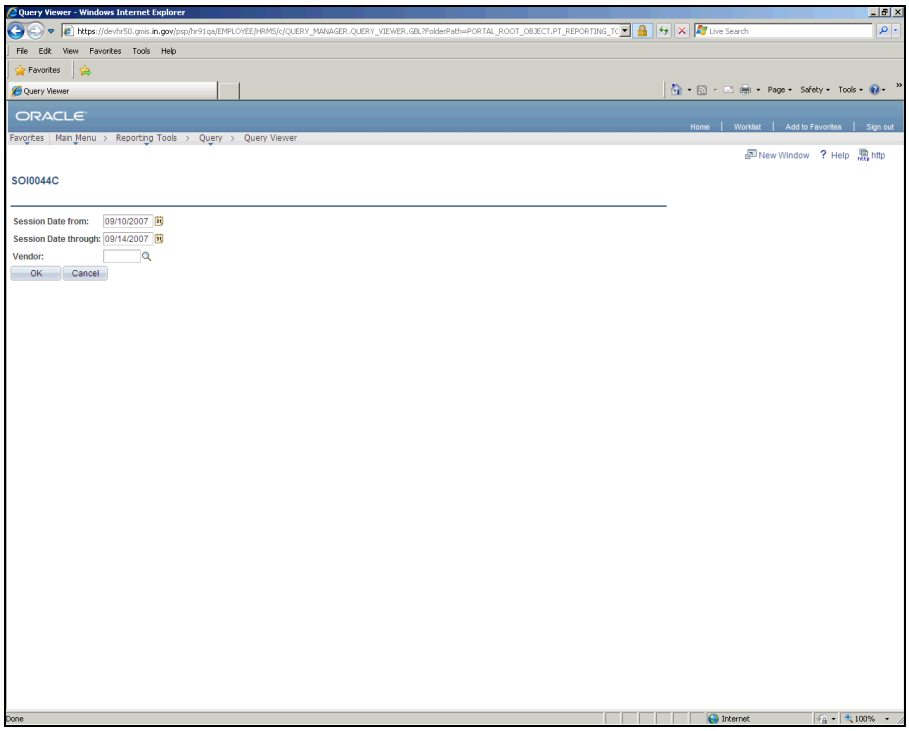
Step	Action
33.	Click the **View Results** button. 
34.	Click the **Close** button for this window. 
35.	Scheduling a query is like scheduling a **PeopleSoft Process** or **Report.** It can be scheduled to run once or on a regular basis by using the **Recurrence** option.

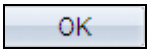


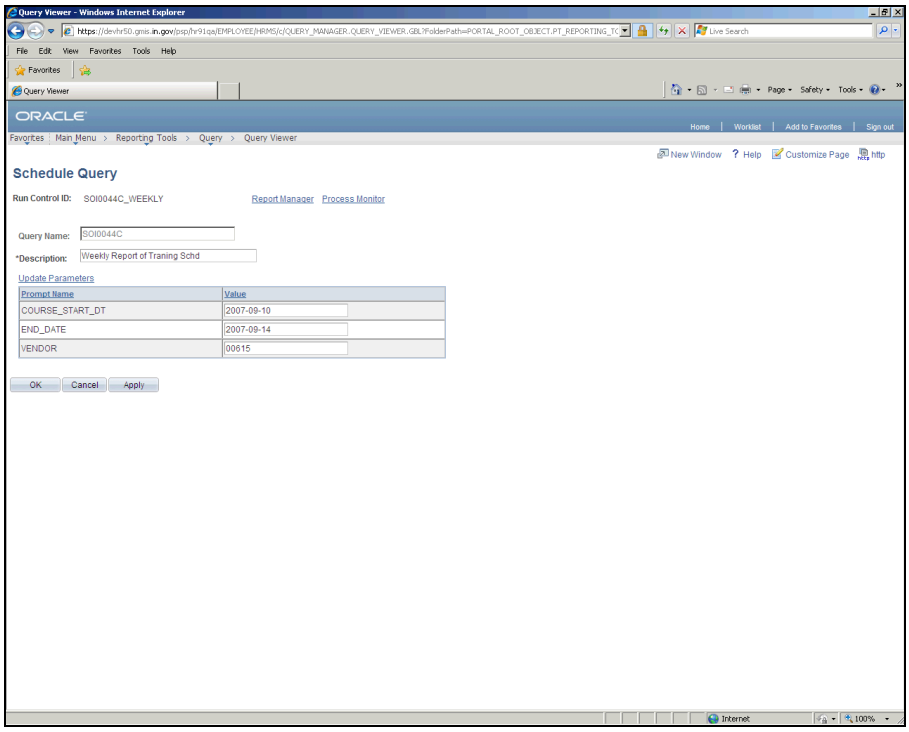
Step	Action
36.	Click the **Schedule** link. 
37.	Enter the desired information into the **Run Control ID** field or add a new one. Enter "**SOI0044C_WEEKLY**."

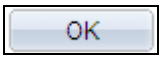


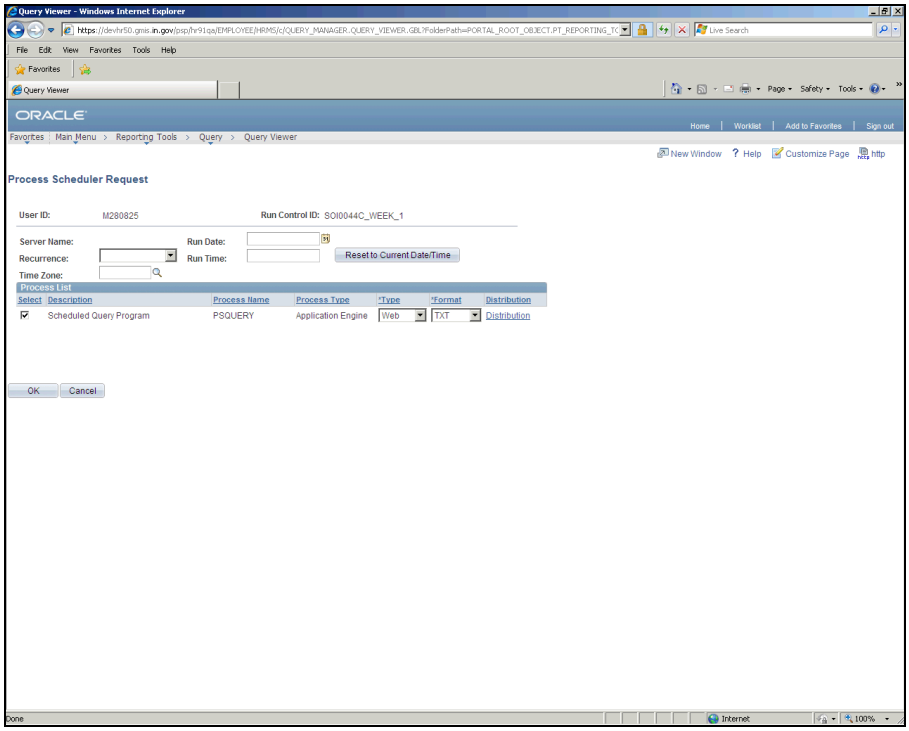
Step	Action
38.	Click the **Add (ALT+1)** button. 
39.	Fill in the prompt values for this query. These prompt values will be used every time this query is scheduled to run.
40.	Click the **Choose a date (ALT+5)** button 
41.	Click to select **September 10, 2007** as the beginning range for the session date. 
42.	Click the **Choose a date (ALT+5)** button. 
43.	Click to select **September 14, 2007** as the ending range for the session date. 



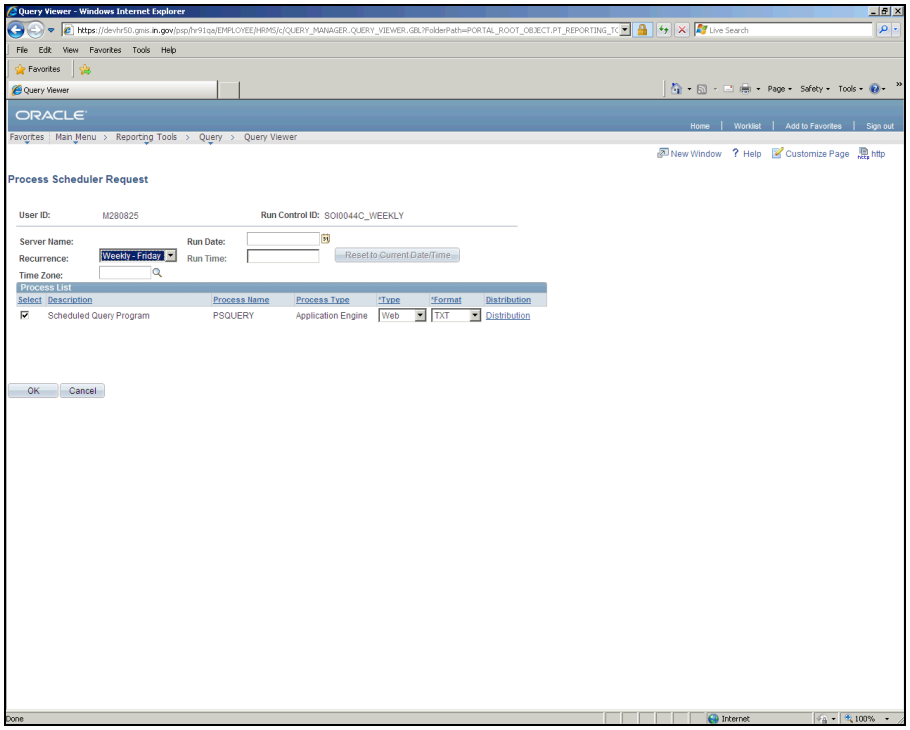
Step	Action
44.	Enter **"00615"** for the **Vendor** (Business Unit). 
45.	Click **OK.** 
46.	Fill in a **Description** of the query. Enter "**Weekly Report of Traning Schd**".



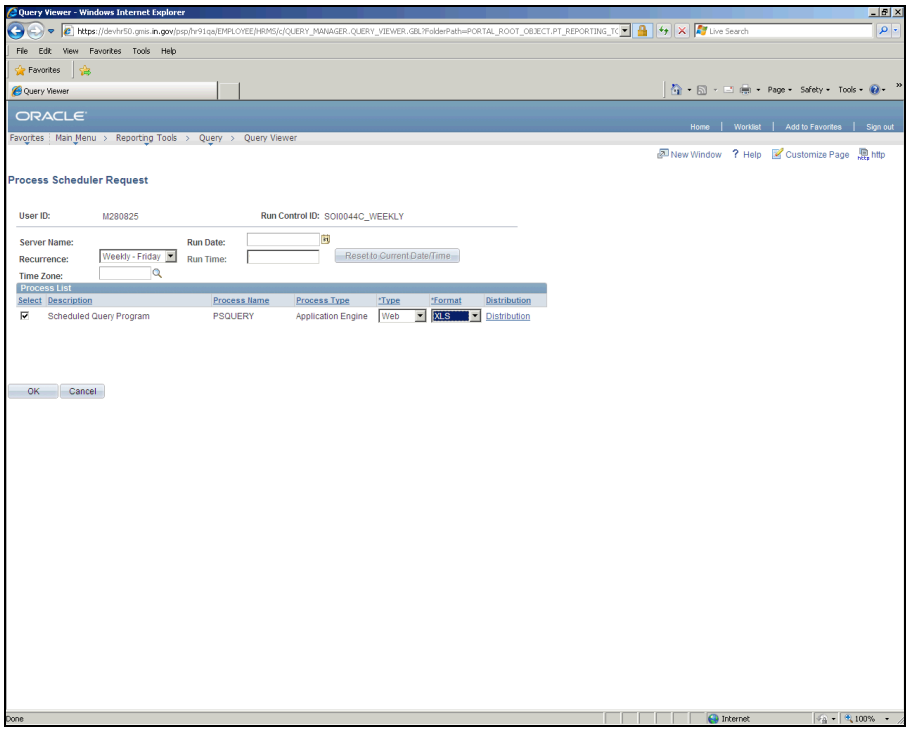
Step	Action
47.	Click **OK.** 



Step	Action
48.	Click the **Recurrence** drop-down menu.
49.	Click to **Scroll down** the list.
50.	Click to select **Weekly - Friday**. Weekly - Friday



Step	Action
51.	Click the ***Format** list drop-down menu. 
52.	Click **XLS.** XLS



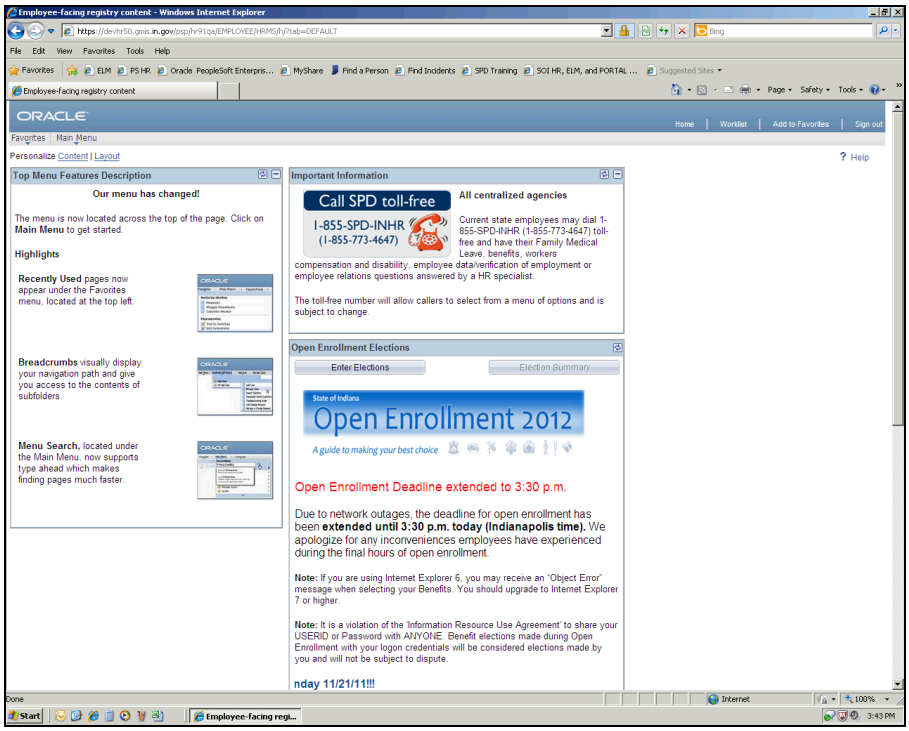
Step	Action
53.	Click **OK**. OK
54.	You will be returned to the **Query Viewer** list. The results of the query will be placed in your **Report folder** and can be viewed in the **Report Manager**. Navigate to **Reporting Tools > Report Manager** to see your query results.
55.	**End of Procedure.**

HR Creating Simple Queries

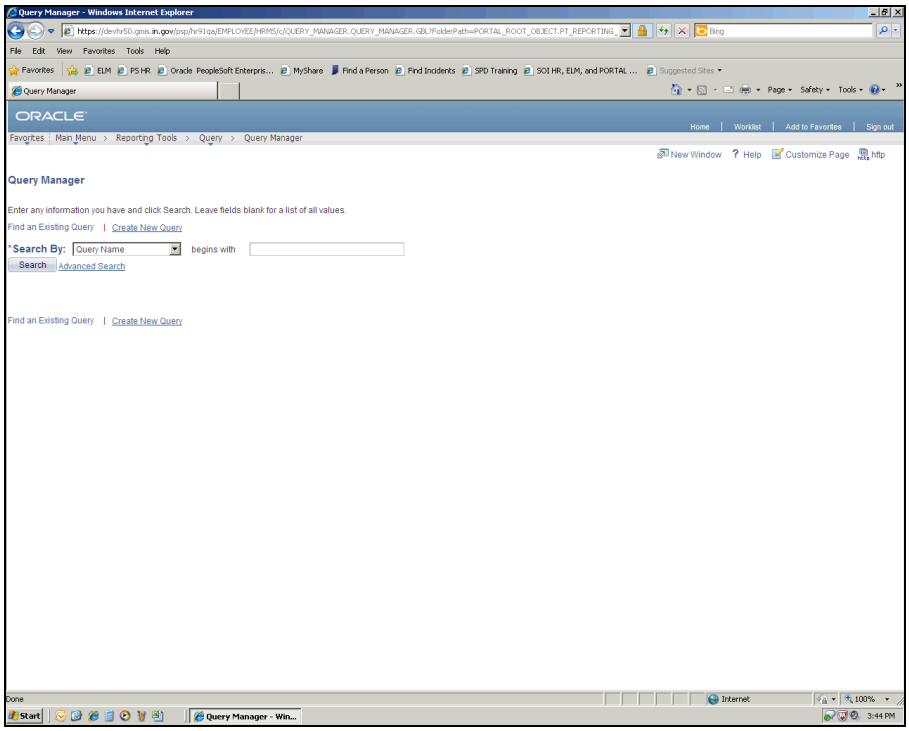
Procedure

By creating HR queries, you can view and extract many different types of useful information.

In this topic, we will discuss and demonstrate creating a simple query in HR 9.1.



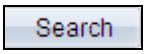
Step	Action
1.	Click the **Main Menu** link. 
2.	Point to the **Reporting Tools** menu.
3.	Point to the **Query** menu.
4.	Click the **Query Manager** link. 



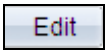
Step	Action
5.	Click the **Create New Query** link.
6.	The **Query Designer** has several tabs/pages. We begin on the **Records** tab where we will select one or more records (a.k.a. **data tables**) to be queried. To begin the query, we will select the **Employees record**. This contains detailed information on **current employees**. Enter the desired information into the **begins with** field. Enter "**employees**".

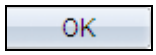
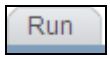
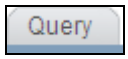
Step	Action
7.	**Most Used Records** **General Note:** Most of these **Records** have the field **COMPANY** in them. This shows whether the row is for a **State of Indiana** or a **QUASI** type. When creating queries that exclude QUASIs, use criteria "**COMPANY = SOI**." ·**EMPLOYEES** - Consolidated data on active employees. This is actually a view rather than a record. Information here is refreshed nightly and comes from more than a dozen records in the HR system. Many of these are shown below. Querying the **Employees** table is an easy way to report a wide variety of data. ·**EMPLOYMENT** - Employment history of all employees, but only detailed since 01 October 1999. Important fields here include **Initial Hire Date, Last Re-hire Date, Adjusted Hire Date** and **Seniority Date**. ·**JOB** - Job history of all employees, but only detailed since 01 October 1999. Important fields here include **Position Number, Job Code** and **Title, Effective Dates, Department Name** and **Number, FTE, Pay Frequency, Rates** (hourly, monthly, annual,) **Shift** and **Physical Location**. This also shows promotions demotions, transfers, and other miscellaneous actions, one row for each action. This record is effective dated). ·**EMPL_CHECKLIST** - General purpose checklist, used for tabulating orientation of new employees, tracking and predicting performance appraisals. ·**DIVERSITY** - Race codes for EEO reporting. ·**PERSON** - Birth and death data. ·**PERSONAL_DATA** - Employee current name only. ·**PERS_DATA_EFFDT** - Both personal and professional records, effective dated. ·**ADDRESSES** - Employee home addresses, effective dated.

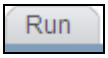
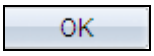
Step	Action
8.	**More Most Used Records** ·**PERS_NID** - Social Security Numbers, tied to EmplID. ·**POSITION_DATA** - Position data only no **Employee** data. Includes **Position Number** and long and short descriptions. These may not be the same as employee **Job Titles, Business Unit** and **Department IDs, Standard Working Hours** by day of the week, and **Position Number of Supervisor**. ·**POSN_VACANT** - Lists every vacant position, and its status, with minimum position data. ·**POSN_HISTORY2** - List of **current** and **past** employees (**EmplID** only) by position, along with **Start** and **End** dates in that position. ·**JOBCODE_TBL** - Lists **Job Codes** and their official titles, both long and short, detailed **Salary data, Union Affiliation, EEO data, Required Security Clearance, Minimum Qualifications** for hiring. ·**DEPT_TBL** - Lists all **Departments, past, present**, and **future**. Includes **Number** and **Descriptions** (long and short,) **Manager's EmplID** and **Position Number**. ·**APPLICANTS** - Shows all **Applicants** starting from 01 October 1999. Includes **Highest level of Education, Lowest Acceptable Salary, Desired conditions** (full/part-time, shift, locations, resume, language skills). ·**BUS_UNIT_TBL_HR** - Lists the HR-related **Business Units**. Includes **Number, Long** and **Short Descriptions**, and **Other Business Unit** number assignments for other applications like AP, AR, Budgeting, and General Ledger. **Note: Business Units** were previously known as **Agencies**.

Step	Action
9.	**Even More Most Used Records** ·**JOB_REQUISITION** - List of all **Job Requisitions**. Includes **Business Unit, Position Number, Recruiter ID, Authorizer ID, Opening** and **Closing Dates**. ·**JOB_LABOR** - **Bargaining Unit** and **Union-related data**. ·**TRAINING** - **Employee Training History** table: one row for each class attended by each employee or contractor. ·**CRSE_SESSN_TBL** - Schedule of **State Course Sessions**. Shows **Starting** and **Ending** dates and times. ·**COURSE_TBL** - Catalog of **State Courses**. Cites **Course Code** and **Description, Academic Credits, Duration, Instructor Qualifications, Minimum** and **Maximum Number of Students per Session**. ·**TRN_FACIL_TBL** - List of **State Training Facilities, Buildings,** and **Rooms**. ·**TRN_INSTRCT_TBL** - List of **Qualified Instructors**. **Note:** Many instructors are missing from this record.
10.	Click the **Search** button. 

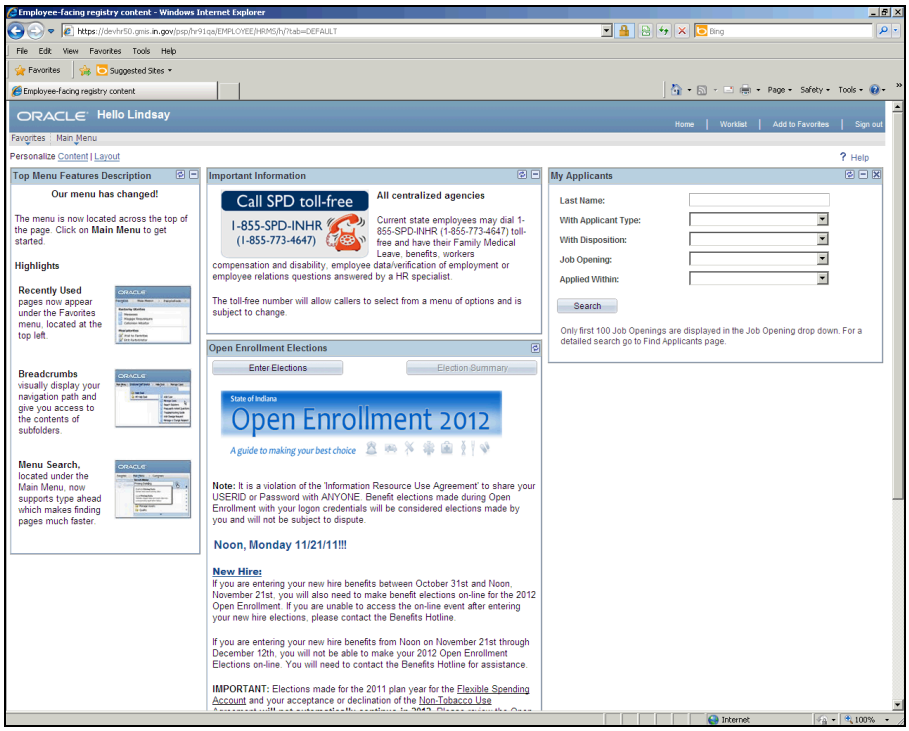
Step	Action
11.	**Tips on table joins to the EMPLOYEES record** The **EMPLOYEES Record** is not an ordinary database table. It is a **View**, and derives its data from ten different **Records** to save time when you need HR data. But it only shows **ACTIVE CURRENT** employees. If you want data about past employees no longer working here (no matter why they terminated) you have to search other records. One example for the history of positions held by someone, you need to look at the **JOB Record**. If you wanted to check their dates of employment, you would have to look at the **EMPLOYMENT Record**. And neither of these records has the employee's **Name, SSN**, or any other personal data. We have to **join** records together, usually by **Employee ID (EmplID)** to get the correct data. Another example is a search to find past personnel in a particular position, especially one with a high turnover rate. Here you need to join the **POSN_VACANT record** with the **POSN_HISTORY2 Record** to discover who has been in a position. This only gives us the employee IDs. If we want names and addresses, we have to look in at least two more records for that data as well. To get a past employee's complete **Job History** and their **Name** and other data, on the same report, we need to pull data from at least two sources. The **JOB Record** gives the actual job history, in detail. **PERSONAL_DATA** will supply the name only. **DIVERSITY** supplies the **ETHNIC_GROUP** (formerly **RACE**). A person's **Social Security Number** comes from the **PERS_NID Record**. The **EMPLOYMENT Record** will give us employees' **ORIGINAL_HIRE_DT** and **SERVICE_DT. SERVICE_DT** is the adjusted hire date, showing longevity of service. The **PERSONAL_DATA Record** will give us the current name for each employee.
12.	Click the **Add Record** link. 
13.	Click the **OK** button. 
14.	The **Query** tab shows all the **records** and **fields** you are selecting. Once you have made these selections, you may further refine your query by using the other tabs shown here. We have chosen the **EMPLOYEES record**. We must now choose the **fields** within that **record** to display in the query. We will start by simply selecting the **Empl ID** field. Click the **EMPLID - Empl ID** option. 

Step	Action
15.	**Descriptions of each tab in the Query Designer** **Records**: This is where the names and the contents of all **records** are available to choose for your query. **Query**: Shows your chosen **record(s)** and allows you to select the specific **fields** to include in your query. Clicking on the **funnel icons** to the right of the **fields** allows you to enter a **field's** row selection **criteria**. **Expressions**: User-constructed mathematical statements used as output or part of a criterion. **Prompts**: Shows the **prompts** used in this query. **Prompts** allow users to enter dates or other **criteria** values each time a query is run. **Fields**: Manages displaying the **record fields** selected for this query. **Criteria**: Shows all of the row selection **criteria** used in this query. **Having**: For more complex queries, **criteria** used on a query's **aggregate** functions such as **count** or **average**. For example, show rows where average is greater than X. **View SQL**: Shows the **Structured Query Language (SQL)** statements generated by the query designer and used to query the database. The **SQL** shown here is read-only. **Preview**: Allows users to **run** the query and view the results prior to saving the query. **Caution**: It is a good practice to save (at least) a temporary copy of a new query prior to previewing it in case the session fails and loses your query.
16.	Click the **Fields** tab. 
17.	The Fields tab manages the display characteristics for the **record fields** you have selected for this query. Click the **Edit** button. 

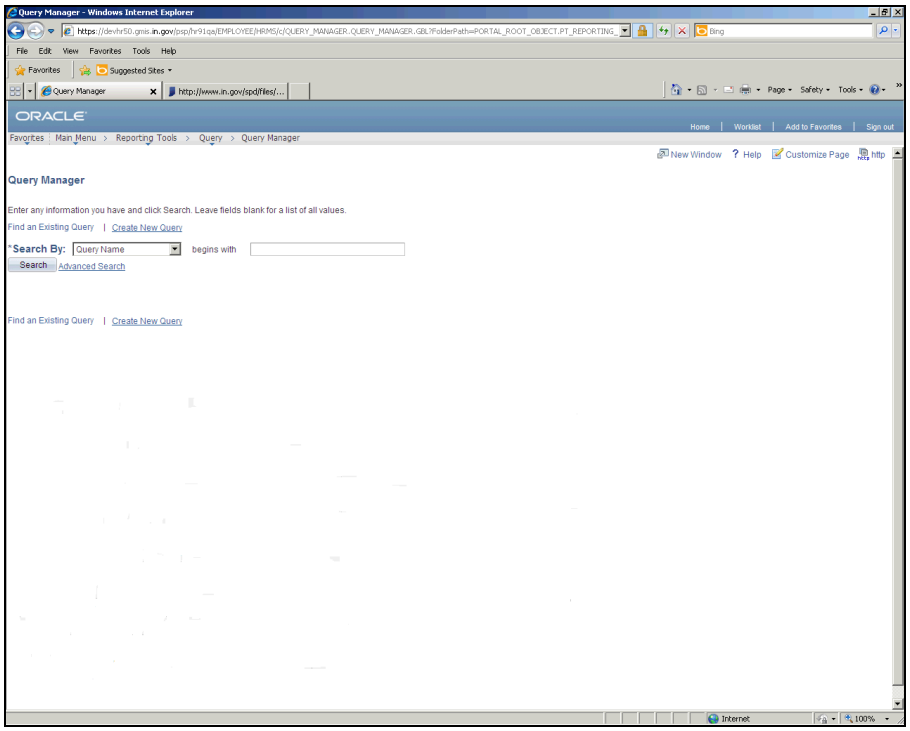
Step	Action
18.	**Explanations of field display characteristics shown on the Fields tab.** The **Fields** tab manages the display characteristics for the **record fields** you've selected for this query. These characteristics are described below: **Col**: Tells us numerically in which column each data element will appear in each row. **Record.Fieldname**: Tells the **relative name** of each **record's** alias and **field**. **Format**: Explains how the data field is set up for use. Some of these are: **Char** (Character;) **Num** (Numeric;) and **Date** (usually in the form mm/dd/yyyy.) It also tells how many characters are in the **field**. This can help to determine printing requirements. **Ord**: A number in this column shows the sequence for sorting the output. The numbers show the importance of the **field(s)** when sequencing them. **1** is the highest. **XLAT**: When a **field** has entries in PeopleSoft's **Translate Table**, an entry will tell you if and how the **field** is translated. (**N** for **No Translation, S** for a **Short Translation, L** for a **Long Translation**.) **Agg**: Tells you what **Aggregate** functions are in use. This includes **Sum, Count, Min**(imum,) **Max**(imum,) and **Avg** (Average). **Heading Text**: Shows **column heading** text for this **field**.. **Add Criteria**: The **funnel icon** in this column allows you to add this **field** to your **criteria** page for adding **row selection criteria** to it. **Edit**: Use the **Edit button** to change any of the **field's** characteristics displayed on this page. **Delete**: Click on the **minus icon** to remove this **field** from the query's display.
19.	Click the **Count** option. 
20.	Click the **OK** button. 
21.	Click the **Run** tab. 
22.	We have performed a **count** of employees. Now we will include some additional **fields.** Click the **Query** tab. 

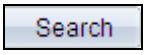
Step	Action
23.	Click the **View 100** link. 
24.	Click the scrollbar.
25.	Click the **JOBCODE - Job Code** option. 
26.	Click the scrollbar.
27.	Click the **SEX - Gender** option. 
28.	Click the scrollbar.
29.	Click the **Run** tab. 
30.	Now the employee totals are broken down by **Jobcode** and **Sex - Gender**. We want to save the query now, but we cannot save from this tab. Click the **Fields** tab. 
31.	Click the **Save As** link. 
32.	Enter the desired information into the **Query** field. Enter "**job_gender_count**".
33.	Enter the desired information into the **Description** field. Enter "**Total Jobcodes by Gender**".
34.	Enter the desired information into the **Folder** field. Enter "**Dept Statistics**".
35.	Enter the desired information into the **Query Definition** field. Enter "**Counting agency employees by jobcode and gender. Will run this once a quarter.**"
36.	Click the **OK** button. 
37.	**End of Procedure.**

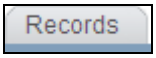
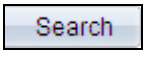
Procedure

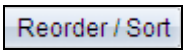
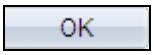


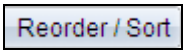
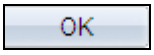
Step	Action
1.	Click the **Main Menu** button. 
2.	Point to the **Reporting Tools** menu.
3.	Point to the **Query** menu.
4.	Click the **Query Manager** menu. 

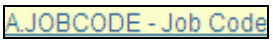
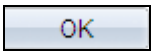
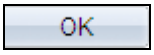
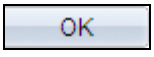


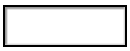
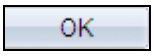
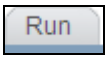
Step	Action
5.	Click the **Create New Query** link.
6.	First, we'll locate the **EMPLOYEES record**. Enter "**employees**".
7.	Click the **Search** button. 
8.	Click the **Add Record** link. 
9.	Click the **OK** button. 
10.	We are going to select several of the **Employee record's** 206 **fields** here. Click the **Sort fields alphabetically** button to make the **fields** easier to find. 
11.	Click to select the **Annual Rate field**. 
12.	Click to select the **Birthdate field**. 
13.	Click to select **Business Unit**. 

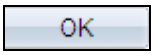
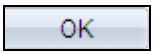
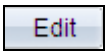
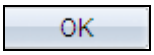
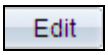
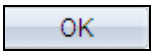
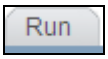
Step	Action
14.	Click to **Scroll Down**.
15.	Click to select **Company Seniority Date**. 
16.	Click to **Scroll Up**.
17.	Click the **Show next row (Alt+.)** button. 
18.	Click to select **Ethnic Group**. 
19.	Click the **Show next row (Alt+.)** button. 
20.	Click to select **Hire Date**. 
21.	Click to select **Job Code**. 
22.	Click to select **Job Title**. 
23.	Click to **Scroll Down**.
24.	Click to select **Name**. 
25.	Click to **Scroll Up**.
26.	Click the **Show next row (Alt+.)** button. 
27.	Click to **Scroll Down**.
28.	Click to select **Sex - Gender**. 
29.	Click to **Scroll Up**. 
30.	Now that we have selected **fields** from the **Employees** table, we will join the **Business Unit** table to get a description. Click the **Records** tab. 
31.	Enter "**busunit**".
32.	Click the **Search** button. 

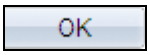
Step	Action
33.	Here we are selecting our **record** to join. Click **Join Record** for **BUSUNIT_HR_VW - HR Business Unit Lang Table**. 
34.	Notice we have 2 options for the type of join we are performing. Generally you will perform a **Standard join**. Click the link to join the record for **A=EMPLOYEES - Non terminated Employees**. 
35.	The system will automatically suggest the most logical join criteria. In this case, by the **Business Unit fields** of each **record**. Click the **Add Criteria** button. 
36.	Click to select **Descr - Description** checkbox. 
37.	Click the **Fields** tab. 
38.	Click the **Reorder / Sort** button. 
39.	From this screen, we will place the numbers in the **Column Order** fields to order the columns.
40.	Enter "**8**".
41.	Enter "**9**".
42.	Enter "**1**".
43.	Enter "**7**".
44.	Enter "**10**".
45.	Enter "**6**".
46.	Enter "**4**".
47.	Enter "**5**".
48.	Enter "**3**".
49.	Enter "**11**".
50.	Enter "**2**".
51.	Click the **OK** button. 

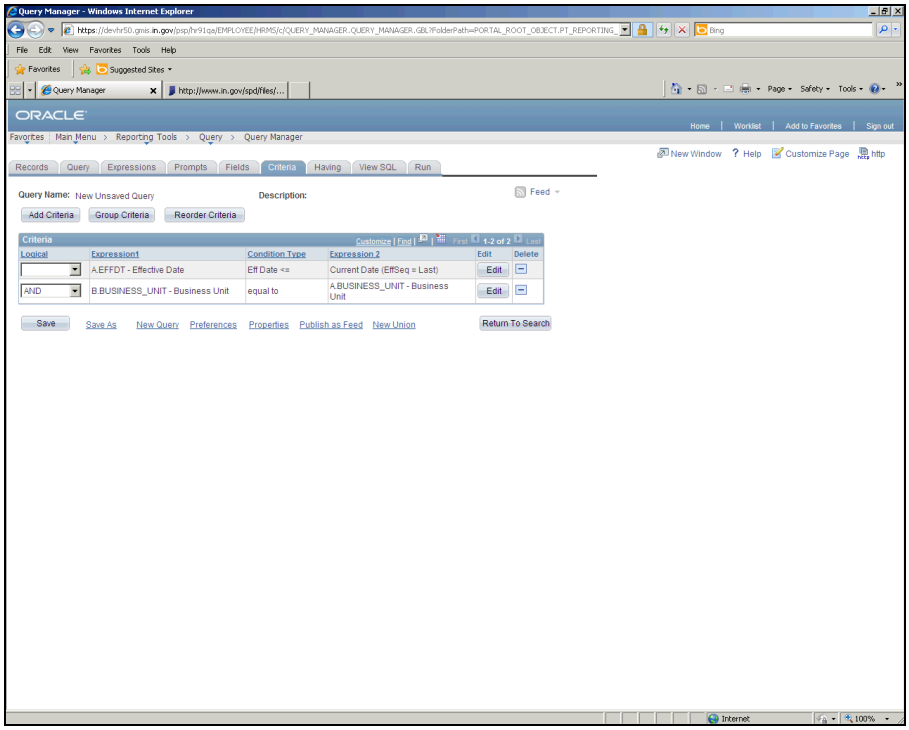
Step	Action
52.	You can now see that the **Column** order has updated. Click the **Reorder / Sort** button. 
53.	From this screen, numbers can be placed in the **New Order By** fields to order how the information is presented. In addition, information is automatically reported in **ascending** direction (from least value to greatest value). You can change the direction to **descending** (from greatest value to least value) by marking the checkbox next to the appropriate record field.
54.	Enter "**1**".
55.	Enter "**2**".
56.	Enter "**3**".
57.	Click the **OK** button. 
58.	Click the **Criteria** tab. 
59.	Notice that the **Effective Date=Current** and **Business Unit** join **criteria** are already here. Next, we will add **criteria** to pick specific types of **Jobcodes**. This may be done by using the **Add Criteria** button above or by selecting the **field** to be used in the **criteria** from the **Fields tab**. Since the **Employees record** contains so many **fields**, it will be easier to use the **Fields tab** to select fields for adding **criteria**.
60.	**Decision:** Please make a selection from the options listed below. • Using the Add Criteria Button Go to step 61 on page 30 • Using the Fields Tab to select fields for adding Criteria Go to step 113 on page 34
61.	Click the **Add Criteria** button. 
62.	Click the **Select Record and Field** button. 
63.	Click the **Show next row (Alt+.)** button. 
64.	Click the **Show next row (Alt+.)** button. 

Step	Action
65.	Select **Job Code**. 
66.	Click the ***Condition Type** list. 
67.	Select **like**. 
68.	Since we have chosen the **Like** condition type, we can use the **%** wildcard. Enter "**00E%**".
69.	Click the **OK** button. 
70.	To select additional criteria for **Jobcode**, we will choose that field from the **Fields tab**. Click the **Fields** tab. 
71.	Click the **Add Criteria** button on the **JOBCODE** row. 
72.	Click the ***Condition Type** list. 
73.	Select **like**. 
74.	Enter "**001%**".
75.	Click the **OK** button. 
76.	Click the **Add Criteria** button on the **JOBCODE** row 
77.	Click the ***Condition Type** list. 
78.	Select **like**. 
79.	Enter "**002%**".
80.	Click the **OK** button. 
81.	Now that we have selected several types of **Jobcodes**, we must change the **logical operators** between them to **OR** so that any employees meeting one of these **Jobcodes** will be selected.

Step	Action
82.	We will make these changes from the **Criteria tab**. 
83.	Click on the **Logical** dropdown list in the fourth row. 
84.	Select **OR**. 
85.	Click on the **Logical** dropdown list in the last row. 
86.	Select **OR**. 
87.	Now we must group these **OR** conditions together. Click the **Group Criteria** button. 
88.	Enter "**(**" in the third empty field down the left-hand side of the **Edit Criteria Grouping** box to group the **Job Code** information.. Click in the **Left Paren** field. 
89.	Enter "**)**" in the last empty field down the right-hand side of the **Edit Criteria Grouping** box to group the **Job Code** information.
90.	Click the **OK** button. 
91.	Click the **Run** tab. 
92.	Here are the results. Now let's add a **Prompt** so that we can choose a list exclusively by gender. Click the **Fields** tab. 
93.	Click the **Add Criteria** button for **SEX - Gender** row. 
94.	Let's look at the possible options for gender selection. Click the **Select Constant From List** button. 

Step	Action
95.	We could "hardcode" one of these options, but instead we will add a **prompt** to choose **gender** each time the query is run. Click the **Cancel** button. 
96.	Click the **Prompt** option. 
97.	Click the **New Prompt** link. 
98.	Click the **OK** button to accept the **Prompt**. 
99.	Click the **OK** button to accept the new **criteria**. 
100.	Finally, let's look at the **XLAT** values for the last two fields. Notice the value is currently **N**. This means that we can edit the fields' **display properties** to show a value rather than an undescriptive code for values in these fields.
101.	Click the **Edit** button for **Ethnic Group**. 
102.	You may choose a **short** or **long** translate value. Click the **Short** option. 
103.	Click the **OK** button. 
104.	Click the **Edit** button for the **Sex - Gender** row. 
105.	Click the **Short** option. 
106.	Click the **OK** button. 
107.	Click the **Run** tab. 
108.	Click the **Sex - Gender** dropdown list. 
109.	Click **Female** from the list. 

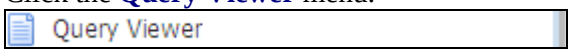
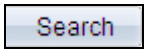
Step	Action
110.	Click the **OK** button. 
111.	Notice the translate values in the last two columns.
112.	Your query has been completed! Don't forget to save your queries!! **End of Procedure.** Remaining steps apply to other paths.

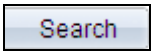


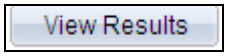
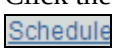
Step	Action
113.	Click the **Fields** tab. 
114.	Click the **Add Criteria** button on the **JOBCODE** row.  Go to step 66 on page 31

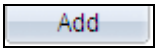
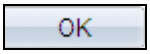
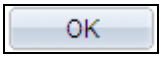
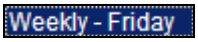
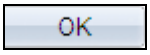
Appendixes

Appendix A: Running HR Queries Job Aid

Step	Action
	Click the **Main Menu** button. 
	Point to the **Reporting Tools** menu.
	Point to the **Query** menu.
	Click the **Query Viewer** menu. 
	Type the **Name** of a query you want to run or leave the field blank. You may also search by the **Description** of the query. Enter a valid value, e.g. "soi_sum".
	Frequently used HR Public Queries SOI_JOBCODE_IN_AGY List of JCs in an agency SO_E_LEVEL All E-Level EEs sort/salary SOI_FSSA_ACTIVE_EMPS EFFDT Prompt
	Click **Search**. 
	Frequently Used HR Public Queries Your search will return one or more queries. Notice there are several columns listed: **Query** - The name of the query. **Description** - A short description of the query. **Owner** - To indicate your private queries or public ones that anyone can use. **Folder** - The folder used if you placed this query in a query folder. **Run to HTML** - Click here to run the query to a web page. A new window will open up. **Run to Excel** - Click here to run the query to a spreadsheet. A new window will open up. **Schedule** - Click here to schedule the query to run later or to run a query that returns a lot of information. **Add to Favorites** - Click here to store the query in your query favorites.

Step	Action
	We will choose the **Run to HTML** option which opens a new window with the query results in a html format. Click the **Run to HTML** link. 
	Click the **Maximize** button.
	Notice the **Excel Spreadsheet** and **CSV Text File** links. These let you download all rows into Excel or into a comma-delimited text file. You may see the **View All** link above the first column. If the query returned more rows than display on the page, you can click this link to see all rows.
	Notice the navigation buttons above the right columns. These let you see the next chunk of rows returned. There are links to the **First** page, < for the previous page, > for the next page, and the **Last** page. You will also see which rows you are looking at and how many rows are returned all together. Click the **Show Next** rows button.
	Click the **Close** button. 
	Some queries have prompts to limit what is returned. Some ask you to type in values free-form. Others may allow you to click on the **Magnifying Glass** icon to display a list of valid values or the **Calendar** icon to pick a date. Some queries allow a **%** for a wildcard.
	Click the **Advanced Search** link. 
	Click the **Description** list drop-down menu. 
	Click **contains**. 
	Enter "**train**" into the **Description** field.
	Click **Search.** 
	For this example we will look for the **Training Calendar**. Click the **Run to HTML** link. 
	Click the **Maximize** button.

Step	Action
	First, we'll choose a **Course Start Date**. Click the **Choose a date (ALT+5)** button. 
	Click **September 1, 2003.** 
	Next, we'll choose a **Through Date.** Click the **Choose a date (Alt+5)** button. 
	Click the **September 1, 2004.** 
	Next we need to choose a **Business Unit** for this query. Here, it's referred to as **Vendor**. Click the **Look up Vender (ALT+5)** button. 
	Since the query is asking for a **Vendor,** or **Business Unit,** this window allows you the option of locating the business unit of your choice. If you do not know the **Business Unit**, you can perform an advanced search. For this example we will be using the Department of Correction **Business Unit** which is **"00615"**
	Type "**00615**" into the search field.
	Click the **Look Up** button. 
	Click the **00615** link. 
	Click the **View Results** button. 
	Click the **Close** button for this window. 
	Scheduling a query is like scheduling a **PeopleSoft Process** or **Report.** It can be scheduled to run once or on a regular basis by using the **Recurrence** option.
	Click the **Schedule** link. 

Step	Action
	Enter the desired information into the **Run Control ID** field or add a new one. Enter a valid value e.g. "**SOI0044C_WEEKLY**."
	Click the **Add (ALT+1)** button. 
	Fill in the prompt values for this query. These prompt values will be used every time this query is scheduled to run.
	Click the **Choose a date (ALT+5)** button 
	Click to select **September 10, 2007** as the beginning range for the session date. 
	Click the **Choose a date (ALT+5)** button. 
	Click to select **September 14, 2007** as the ending range for the session date. 
	Enter **"00615"** for the **Vendor** (Business Unit). 
	Click **OK.** 
	Fill in a **Description** of the query. Enter a valid value e.g. "**Weekly Report of Traning Schd**".
	Click **OK.** 
	Click the **Recurrence** drop-down menu.
	Click to **Scroll down** the list.
	Click to select **Weekly - Friday**. 
	Click the ***Format** list drop-down menu. 
	Click **XLS.** 
	Click **OK**. 

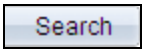
Step	Action
	You will be returned to the **Query Viewer** list. The results of the query will be placed in your **Report folder** and can be viewed in the **Report Manager**. Navigate to **Reporting Tools > Report Manager** to see your query results.
	End of Procedure.

Appendix B: HR Creating Simple Queries Job Aid

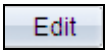
Step	Action
	Click the **Main Menu** link. 
	Point to the **Reporting Tools** menu.
	Point to the **Query** menu.
	Click the **Query Manager** link. 
	Click the **Create New Query** link.
	The **Query Designer** has several tabs/pages. We begin on the **Records** tab where we will select one or more records (a.k.a. **data tables**) to be queried. To begin the query, we will select the **Employees record**. This contains detailed information on **current employees**. Enter the desired information into the **begins with** field. Enter a valid value e.g. "**employees**".

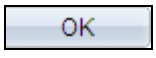
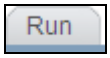
Step	Action
	Most Used Records **General Note:** Most of these **Records** have the field **COMPANY** in them. This shows whether the row is for a **State of Indiana** or a **QUASI** type. When creating queries that exclude QUASIs, use criteria "**COMPANY = SOI**." ·**EMPLOYEES** - Consolidated data on active employees. This is actually a view rather than a record. Information here is refreshed nightly and comes from more than a dozen records in the HR system. Many of these are shown below. Querying the **Employees** table is an easy way to report a wide variety of data. ·**EMPLOYMENT** - Employment history of all employees, but only detailed since 01 October 1999. Important fields here include **Initial Hire Date, Last Re-hire Date, Adjusted Hire Date** and **Seniority Date**. ·**JOB** - Job history of all employees, but only detailed since 01 October 1999. Important fields here include **Position Number, Job Code** and **Title, Effective Dates, Department Name** and **Number, FTE, Pay Frequency, Rates** (hourly, monthly, annual,) **Shift** and **Physical Location**. This also shows promotions demotions, transfers, and other miscellaneous actions, one row for each action. This record is effective dated). ·**EMPL_CHECKLIST** - General purpose checklist, used for tabulating orientation of new employees, tracking and predicting performance appraisals. ·**DIVERSITY** - Race codes for EEO reporting. ·**PERSON** - Birth and death data. ·**PERSONAL_DATA** - Employee current name only. ·**PERS_DATA_EFFDT** - Both personal and professional records, effective dated. ·**ADDRESSES** - Employee home addresses, effective dated.

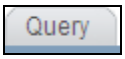
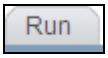
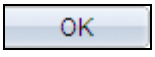
Step	Action
	More Most Used Records ·**PERS_NID** - Social Security Numbers, tied to EmplID. ·**POSITION_DATA** - Position data only no **Employee** data. Includes **Position Number** and long and short descriptions. These may not be the same as employee **Job Titles, Business Unit** and **Department IDs, Standard Working Hours** by day of the week, and **Position Number of Supervisor**. ·**POSN_VACANT** - Lists every vacant position, and its status, with minimum position data. ·**POSN_HISTORY2** - List of **current** and **past** employees (**EmplID** only) by position, along with **Start** and **End** dates in that position. ·**JOBCODE_TBL** - Lists **Job Codes** and their official titles, both long and short, detailed **Salary data, Union Affiliation, EEO data, Required Security Clearance, Minimum Qualifications** for hiring. ·**DEPT_TBL** - Lists all **Departments, past, present**, and **future**. Includes **Number** and **Descriptions** (long and short,) **Manager's EmplID** and **Position Number**. ·**APPLICANTS** - Shows all **Applicants** starting from 01 October 1999. Includes **Highest level of Education, Lowest Acceptable Salary, Desired conditions** (full/part-time, shift, locations, resume, language skills). ·**BUS_UNIT_TBL_HR** - Lists the HR-related **Business Units**. Includes **Number, Long** and **Short Descriptions**, and **Other Business Unit** number assignments for other applications like AP, AR, Budgeting, and General Ledger. **Note: Business Units** were previously known as **Agencies**.

Step	Action
	Even More Most Used Records ·**JOB_REQUISITION** - List of all **Job Requisitions**. Includes **Business Unit, Position Number, Recruiter ID, Authorizer ID, Opening** and **Closing Dates**. ·**JOB_LABOR** - **Bargaining Unit** and **Union-related data**. ·**TRAINING** - **Employee Training History** table: one row for each class attended by each employee or contractor. ·**CRSE_SESSN_TBL** - Schedule of **State Course Sessions**. Shows **Starting** and **Ending** dates and times. ·**COURSE_TBL** - Catalog of **State Courses**. Cites **Course Code** and **Description, Academic Credits, Duration, Instructor Qualifications, Minimum** and **Maximum Number of Students per Session**. ·**TRN_FACIL_TBL** - List of **State Training Facilities, Buildings,** and **Rooms**. ·**TRN_INSTRCT_TBL** - List of **Qualified Instructors**. **Note:** Many instructors are missing from this record.
	Click the **Search** button. 

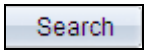
Step	Action
	Tips on table joins to the EMPLOYEES record The **EMPLOYEES Record** is not an ordinary database table. It is a **View**, and derives its data from ten different **Records** to save time when you need HR data. But it only shows **ACTIVE CURRENT** employees. If you want data about past employees no longer working here (no matter why they terminated) you have to search other records. One example for the history of positions held by someone, you need to look at the **JOB Record**. If you wanted to check their dates of employment, you would have to look at the **EMPLOYMENT Record**. And neither of these records has the employee's **Name, SSN**, or any other personal data. We have to **join** records together, usually by **Employee ID (EmplID)** to get the correct data. Another example is a search to find past personnel in a particular position, especially one with a high turnover rate. Here you need to join the **POSN_VACANT record** with the **POSN_HISTORY2 Record** to discover who has been in a position. This only gives us the employee IDs. If we want names and addresses, we have to look in at least two more records for that data as well. To get a past employee's complete **Job History** and their **Name** and other data, on the same report, we need to pull data from at least two sources. The **JOB Record** gives the actual job history, in detail. **PERSONAL_DATA** will supply the name only. **DIVERSITY** supplies the **ETHNIC_GROUP** (formerly **RACE**). A person's **Social Security Number** comes from the **PERS_NID Record**. The **EMPLOYMENT Record** will give us employees' **ORIGINAL_HIRE_DT** and **SERVICE_DT. SERVICE_DT** is the adjusted hire date, showing longevity of service. The **PERSONAL_DATA Record** will give us the current name for each employee.
	Click the **Add Record** link. 
	Click the **OK** button. 
	The **Query** tab shows all the **records** and **fields** you are selecting. Once you have made these selections, you may further refine your query by using the other tabs shown here. We have chosen the **EMPLOYEES record**. We must now choose the **fields** within that **record** to display in the query. We will start by simply selecting the **Empl ID** field. Click the **EMPLID - Empl ID** option. 

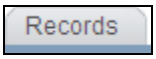
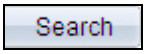
Step	Action
	Descriptions of each tab in the Query Designer **Records**: This is where the names and the contents of all **records** are available to choose for your query. **Query**: Shows your chosen **record(s)** and allows you to select the specific **fields** to include in your query. Clicking on the **funnel icons** to the right of the **fields** allows you to enter a **field's** row selection **criteria**. **Expressions**: User-constructed mathematical statements used as output or part of a criterion. **Prompts**: Shows the **prompts** used in this query. **Prompts** allow users to enter dates or other **criteria** values each time a query is run. **Fields**: Manages displaying the **record fields** selected for this query. **Criteria**: Shows all of the row selection **criteria** used in this query. **Having**: For more complex queries, **criteria** used on a query's **aggregate** functions such as **count** or **average**. For example, show rows where average is greater than X. **View SQL**: Shows the **Structured Query Language (SQL)** statements generated by the query designer and used to query the database. The **SQL** shown here is read-only. **Preview**: Allows users to **run** the query and view the results prior to saving the query. **Caution**: It is a good practice to save (at least) a temporary copy of a new query prior to previewing it in case the session fails and loses your query.
	Click the **Fields** tab. 
	The Fields tab manages the display characteristics for the **record fields** you have selected for this query. Click the **Edit** button. 

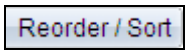
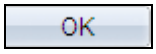
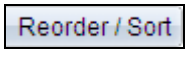
Step	Action
	Explanations of field display characteristics shown on the Fields tab. The **Fields** tab manages the display characteristics for the **record fields** you've selected for this query. These characteristics are described below: **Col**: Tells us numerically in which column each data element will appear in each row. **Record.Fieldname**: Tells the **relative name** of each **record's** alias and **field**. **Format**: Explains how the data field is set up for use. Some of these are: **Char** (Character;) **Num** (Numeric;) and **Date** (usually in the form mm/dd/yyyy.) It also tells how many characters are in the **field**. This can help to determine printing requirements. **Ord**: A number in this column shows the sequence for sorting the output. The numbers show the importance of the **field(s)** when sequencing them. **1** is the highest. **XLAT**: When a **field** has entries in PeopleSoft's **Translate Table**, an entry will tell you if and how the **field** is translated. (**N** for **No Translation, S** for a **Short Translation, L** for a **Long Translation**.) **Agg**: Tells you what **Aggregate** functions are in use. This includes **Sum, Count, Min**(imum,) **Max**(imum,) and **Avg** (Average). **Heading Text**: Shows **column heading** text for this **field**.. **Add Criteria**: The **funnel icon** in this column allows you to add this **field** to your **criteria** page for adding **row selection criteria** to it. **Edit**: Use the **Edit button** to change any of the **field's** characteristics displayed on this page. **Delete**: Click on the **minus icon** to remove this **field** from the query's display.
	Click the **Count** option. 
	Click the **OK** button. 
	Click the **Run** tab. 

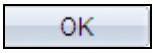
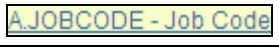
Step	Action
	We have performed a **count** of employees. Now we will include some additional **fields.** Click the **Query** tab. 
	Click the **View 100** link. 
	Click the scrollbar.
	Click the **JOBCODE - Job Code** option. 
	Click the scrollbar.
	Click the **SEX - Gender** option. 
	Click the scrollbar.
	Click the **Run** tab. 
	Now the employee totals are broken down by **Jobcode** and **Sex - Gender**. We want to save the query now, but we cannot save from this tab. Click the **Fields** tab. 
	Click the **Save As** link. 
	Enter the desired information into the **Query** field. Enter a valid value e.g. "**job_gender_count**".
	Enter the desired information into the **Description** field. Enter a valid value e.g. "**Total Jobcodes by Gender**".
	Enter the desired information into the **Folder** field. Enter a valid value e.g. "**Dept Statistics**".
	Enter the desired information into the **Query Definition** field. Enter a valid value e.g. "**Counting agency employees by jobcode and gender. Will run this once a quarter.**".
	Click the **OK** button. 
	End of Procedure.

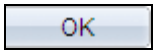
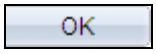
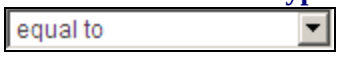
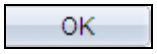
Appendix C: HR Creating More Complex Queries Job Aid

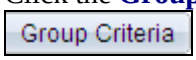
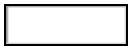
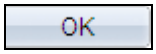
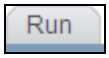
Step	Action
	Click the **Main Menu** button. 
	Point to the **Reporting Tools** menu.
	Point to the **Query** menu.
	Click the **Query Manager** menu. 
	Click the **Create New Query** link.
	First, we'll locate the **EMPLOYEES record**. Enter a valid value, e.g. "**employees**".
	Click the **Search** button. 
	Click the **Add Record** link. 
	Click the **OK** button. 
	We are going to select several of the **Employee record's** 206 **fields** here. Click the **Sort fields alphabetically** button to make the **fields** easier to find. 
	Click to select the **Annual Rate field**. 
	Click to select the **Birthdate field**. 
	Click to select **Business Unit**. 
	Click to **Scroll Down**.
	Click to select **Company Seniority Date**. 
	Click to **Scroll Up**.
	Click the **Show next row (Alt+.)** button. 

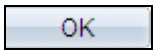
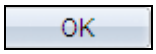
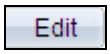
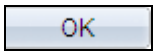
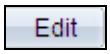
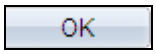
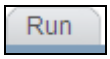
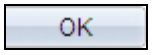
Step	Action
	Click to select **Ethnic Group**. 
	Click the **Show next row (Alt+.)** button. 
	Click to select **Hire Date**. 
	Click to select **Job Code**. 
	Click to select **Job Title**. 
	Click to **Scroll Down**.
	Click to select **Name**. 
	Click to **Scroll Up**.
	Click the **Show next row (Alt+.)** button. 
	Click to **Scroll Down**.
	Click to select **Sex - Gender**. 
	Click to **Scroll Up**. 
	Now that we have selected **fields** from the **Employees** table, we will join the **Business Unit** table to get a description. Click the **Records** tab. 
	Enter a valid value, e.g. "**busunit**".
	Click the **Search** button. 
	Here we are selecting our **record** to join. Click **Join Record** for **BUSUNIT_HR_VW - HR Business Unit Lang Table**. 

Step	Action
	Notice we have 2 options for the type of join we are performing. Generally you will perform a **Standard join**. Click the link to join the record for **A=EMPLOYEES - Non terminated Employees**. 
	The system will automatically suggest the most logical join criteria. In this case, by the **Business Unit fields** of each **record**. Click the **Add Criteria** button. 
	Click to select **Descr - Description** checkbox. 
	Click the **Fields** tab. 
	Click the **Reorder / Sort** button. 
	From this screen, we will place the numbers in the **Column Order** fields to order the columns.
	Enter a valid value e.g. "**8**".
	Enter a valid value e.g. "**9**".
	Enter a valid value e.g. "**1**".
	Enter a valid value e.g. "**7**".
	Enter a valid value e.g. "**10**".
	Enter a valid value e.g. "**6**".
	Enter a valid value e.g. "**4**".
	Enter a valid value e.g. "**5**".
	Enter a valid value e.g. "**3**".
	Enter a valid value e.g. "**11**".
	Enter a valid value e.g. "**2**".
	Click the **OK** button. 
	You can now see that the **Column** order has updated. Click the **Reorder / Sort** button. 

Step	Action
	From this screen, numbers can be placed in the **New Order By** fields to order how the information is presented. In addition, information is automatically reported in **ascending** direction (from least value to greatest value). You can change the direction to **descending** (from greatest value to least value) by marking the checkbox next to the appropriate record field.
	Enter a valid value e.g. "**1**".
	Enter a valid value e.g. "**2**".
	Enter a valid value e.g. "**3**".
	Click the **OK** button. 
	Click the **Criteria** tab. 
	Notice that the **Effective Date=Current** and **Business Unit** join **criteria** are already here. Next, we will add **criteria** to pick specific types of **Jobcodes**. This may be done by using the **Add Criteria** button above or by selecting the **field** to be used in the **criteria** from the **Fields tab**. Since the **Employees record** contains so many **fields**, it will be easier to use the **Fields tab** to select fields for adding **criteria**.
	Decision: Please make a selection from the options listed below. • Using the Add Criteria Button Go to step 61 on page 30 • Using the Fields Tab to select fields for adding Criteria Go to step 113 on page 34
	Click the **Add Criteria** button. 
	Click the **Select Record and Field** button. 
	Click the **Show next row (Alt+.)** button. 
	Click the **Show next row (Alt+.)** button. 
	Select **Job Code**. 

Step	Action
	Click the ***Condition Type** list. 
	Select **like**. 
	Since we have chosen the **Like** condition type, we can use the **%** wildcard. Enter a valid value, e.g. "**00E%**".
	Click the **OK** button. 
	To select additional criteria for **Jobcode**, we will choose that field from the **Fields tab**. Click the **Fields** tab. 
	Click the **Add Criteria** button on the **JOBCODE** row. 
	Click the ***Condition Type** list. 
	Select **like**. 
	Enter a valid value, e.g. "**001%**".
	Click the **OK** button. 
	Click the **Add Criteria** button on the **JOBCODE** row 
	Click the ***Condition Type** list. 
	Select **like**. 
	Enter a valid value, e.g. "**002%**".
	Click the **OK** button. 
	We will make these changes from the **Criteria tab**. 
	Click on the **Logical** dropdown list in the fourth row. 

Step	Action
	Select **OR**. 
	Click on the **Logical** dropdown list in the last row. 
	Select **OR**. 
	Now we must group these **OR** conditions together. Click the **Group Criteria** button. 
	Enter a valid value, e.g. "**(**". Click in the **Left Paren** field. 
	Enter a valid value, e.g. "**)**".
	Click the **OK** button. 
	Click the **Run** tab. 
	Here are the results. Now let's add a **Prompt** so that we can choose a list exclusively by gender. Click the **Fields** tab. 
	Click the **Add Criteria** button for **SEX - Gender** row. 
	Let's look at the possible options for gender selection. Click the **Select Constant From List** button. 
	We could "hardcode" one of these options, but instead we will add a **prompt** to choose **gender** each time the query is run. Click the **Cancel** button. 
	Click the **Prompt** option. 
	Click the **New Prompt** link. 

Step	Action
	Click the **OK** button to accept the **Prompt**. 
	Click the **OK** button to accept the new **criteria**. 
	Click the **Edit** button for **Ethnic Group**. 
	You may choose a **short** or **long** translate value. Click the **Short** option. 
	Click the **OK** button. 
	Click the **Edit** button for the **Sex - Gender** row. 
	Click the **Short** option. 
	Click the **OK** button. 
	Click the **Run** tab. 
	Click the **Sex - Gender** dropdown list. 
	Click **Female** from the list. 
	Click the **OK** button. 
	Your query has been completed! Don't forget to save your queries!! **End of Procedure.** Remaining steps apply to other paths.
	Click the **Fields** tab. 
	Click the **Add Criteria** button on the **JOBCODE** row.  Go to step 66 on page 31